Conditional Eligibility Extract
Job Aid for Certified Insurance Agents

Conditional Eligibility

Covered California consumers in a conditional eligible status will receive a reminder notice from Covered California that informs them they need to provide documents to prove they are eligible to continue their health insurance and/or financial assistance through Covered California.

For more information on the Conditional Eligibility notice and next steps for consumers in a conditional eligibility status, review our Conditional Eligibility Quick Guide.

Conditional Eligibility Extract – How You Can Help

Help consumers maintain their APTC and/or coverage by reminding them to upload verification documents. We are now making it easier for you to identify your consumers that have conditional eligibility.

Within your Agent Extranet account, a monthly report of your Covered California conditionally eligible consumers is provided. The report is titled: **Conditional Eligibility File**. If you log into your Agent Extranet account and you don't see a file, then none of your consumers are conditionally eligible for that month.
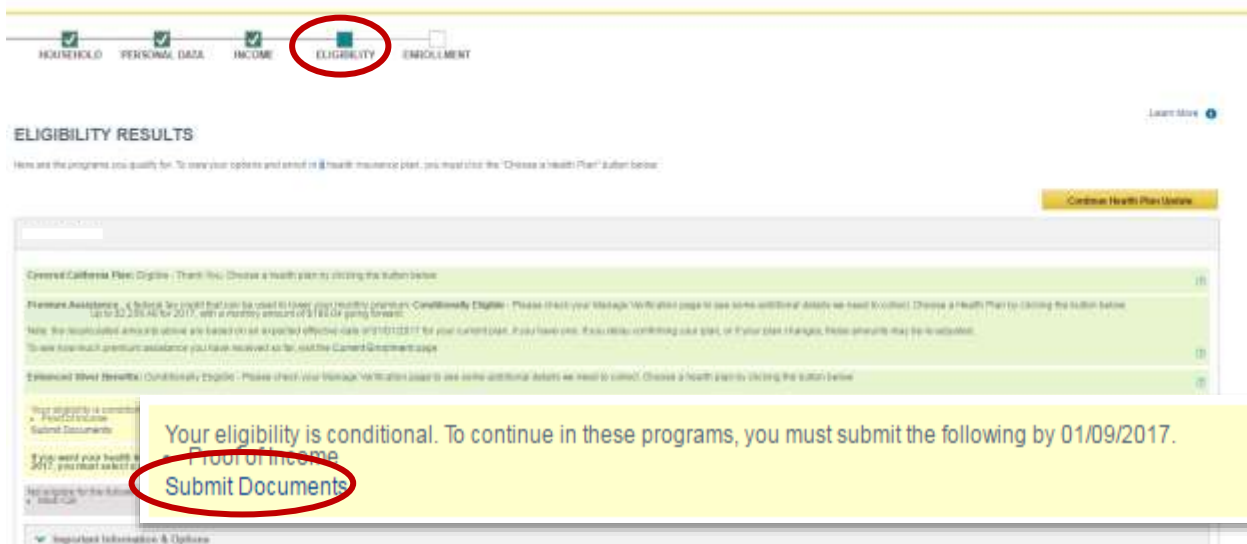
2017 Month	Extract Available
January	1/9/17
February	2/6/17
March	3/6/17
April	4/10/17
May	5/8/17
June	6/5/17
July	7/10/17
August	8/7/17
September	9/11/17
October	10/9/17
November	11/6/17
December	12/11/17

The Conditional Eligibility report is provided as an Excel document, giving the flexibility to sort, and manipulate data to assist consumers in your Book of Business. Remind consumers to submit acceptable documentation to clear their conditional eligible status or help them upload their documents. Each month's extract file contains consumers that have:

- Not submitted documentation – Remind or help these consumers submit their documents.
- Submitted documentation, but they have not yet been processed by Covered California.
    - If the requested documents were previously uploaded via the **"Submit Documents"** link (check the documents and correspondence section on the consumer's home page), the consumer can call the Consumer Service Center at 800-300-1506 and request the documents be verified over the phone.
    - If the requested documents were submitted via fax or mail and are not displayed in the documents and correspondence section, no action is needed, see below for more info.

The **Conditional Eligibility File** will not contain consumers that have passed **ALL** conditional eligible categories, no action is needed.

The **"Submit Documents"** link is found on the **Eligibility Results Page** on a consumer's account who is in a conditional eligibility status. This section is highlighted in yellow. If the **"Submit Documents"** link is available, use the link to upload the requested documents.

Understanding the Conditional Eligibility Extract

The report identifies 6 categories that may lead to the consumer's conditional eligibility status:

1. Income
2. Incarceration
3. Social Security Number
4. Citizenship
5. Lawful Presence
6. American Indian/Alaskan Native

The values under each conditional eligible category are defined as:

- "No Document" – consumer is in a conditional eligibility status – action needs to be taken
- "Document Uploaded" – A document was uploaded, *but* the consumer has not yet had eligibility cleared by Covered California – no action is needed, Covered California will contact the consumer with any questions
- "Pass/E-Verify" – the consumer has been cleared for that particular inconsistency – no action is needed
- Left Blank – there is *no* inconsistency for that eligibility condition – no action is needed

The Conditional Eligibility report will display the values in this format:

Income	Incarc	SSN	Citz	Lawful_Presence	AMER_IND
No Document				Document Uploaded	
Document Uploaded					
Pass/E-Verified		No Document			
No Document					
Document Uploaded					
Pass/E-Verified			No Document		

Example:

A consumer is inconsistent for Income, Social Security Number (SSN), and Citizenship on the current month's file:

Name	Income	INCARC	SSN	CITZ	Lawful_Presence	AMER_IND
John Doe	No Doument		No Document	No Document		

If the consumer submitted SSN and Citizenship documentation, the following month's file will display:

Name	Income	INCARC	SSN	CITZ	Lawful_Presence	AMER_IND
John Doe	No Document		Document Uploaded	Pass/E-Verify		

In this scenario, the Citizenship documents have been verified, but the SSN documents have not yet been processed. The consumer has not submitted any income documents.

Validate a Consumer's Eligibility Status

Once a consumer provides documentation and the documents have been **Passed/E-Verified**, they are no longer in a conditionally eligible status.

The Eligibility Results Page will no longer display the **"Submit Documents"** link and the section will be highlighted in green:

Personally Identifiable Information (PII)

The Conditional Eligibility Extract contains a client's Personally Identifiable Information. Any PII found within the Agent Extranet must remain secure and confidential in accordance with Covered California's agent agreement and all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner.

Fields included on the Conditional Eligibility Extract

The Conditional Eligibility Extract contains the following fields, if applicable:

- Case ID
- Carrier
- Coverage Start Date
- Full Name
- Gender
- County
- Zip Code
- Address, Email, Home Phone Number
- Preferred Language
- Mixed Household designation
- Agent License Number
- Conditionally eligible category:
    - Income
    - Incarceration
    - Social Security Number
    - Citizenship/Lawful Presence
    - American Indian/Alaskan Native
- Conditionally Eligible Reasonable Opportunity Expiration Date (ROP)